

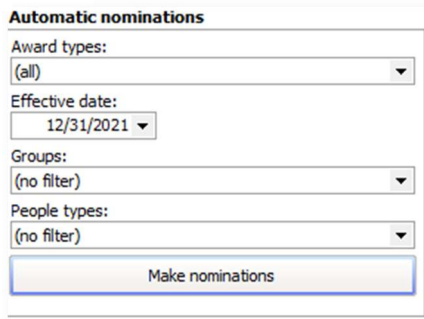
Awards Webinar

January 2022

It is very important to recognize all the hard work your volunteers have done over the year and VSys can help you make this process as easy for you, as it is rewarding for your volunteers. Nominating, Awarding, and reporting can be quick and easy! Below, we will review how to Nominate, Award, and Report.

Awards nominations (“Make automatic nominations”)

- *Make automatic nominations*: Nominate and create awards, for your volunteers, by using the automatic nominations process. This portion of the *Awards manager*, includes the selection of the following item/s:
 - *Award types* – All awards, selected here with a checkmark, will be used to make automatic nominations for volunteers that are eligible, based on the Awards Types rules set up.
 - *Effective date* – Date for which the system will calculate *up to*, for all chosen awards. e.g. – Hours records, account records, etc. up to and including the date chosen.
 - *Groups* – Any *group* chosen here will be a requirement, stipulated in the volunteer profile, for determining the eligibility of the chosen award/s for volunteers.
 - *People types* – Any *person type* chosen here will be a requirement, stipulated in the volunteer profile, for determining the eligibility of the chosen award/s for volunteers.

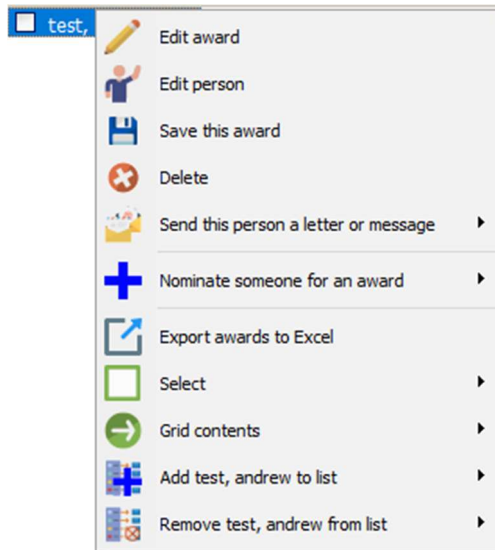


- *Right-click options*: Once awards nominations are created, right-clicking will produce options that can be processed on an individual award basis or for all *selected awards*. Some of the right-click options are:

Individual award, right-click options

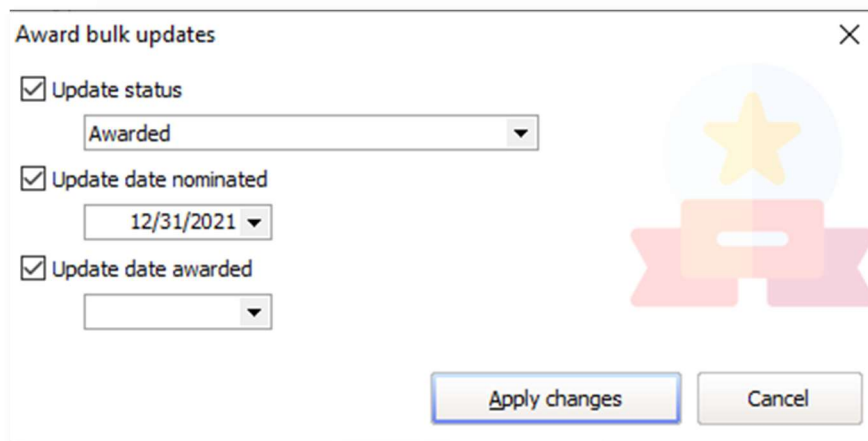
- *Edit award* – Optionally edit that individual award description text, status, date nominated, as well as enter any comments.
- *Save this award* – Will save the individually chosen award and only that award, without the need to click on the *Save* button in the top right of the screen.
- *Send this person a letter or message* – Any relevant letter template can be used, here. The process for sending letters from this right-click option will be the same as your normal process when merging letters and sending from your VSys One database.

- *Add [volunteer name] to list/Remove [volunteer name] from list* – Optionally add/remove the volunteer, chosen here, to/from any *standard* list.

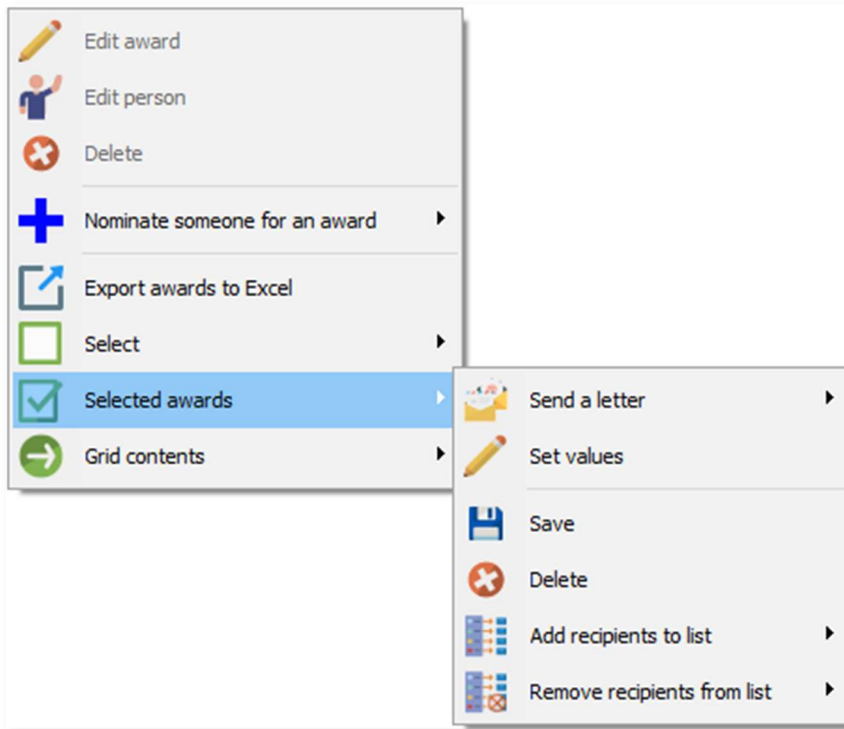


Selected awards, right-click options

- *Send a letter* - Any relevant letter template can be used, here. The process for sending letters from this right-click option will be the same as your normal process when merging letters and sending from your VSystem One database.
- *Set values* – Optionally choose to: *Update status* for all selected awards to the status chosen; *Update date nominated* for all selected awards to the date chosen; *Update date awarded* for all selected awards to the date chosen. (*Please note, once you have set the appropriate changes to be made, you will then need to click on the *Save* button in the top right of your screen to save those changes.*)



- *Add recipients to list/Remove recipients from list* – Optionally add/remove the volunteers, listed here, to/from any *standard* list.



- Award statuses - *Nominated date/Awarded date*: These fields can be used to keep track of your Awards, and what stage of the awards process you are in, that year.
 - Marking awards as *awarded*, weeks or months before the award ceremony may not be the most appropriate so, creating awards with the initial status of *System created* or *Nominated* may be suitable until you can appropriately mark them as *Awarded*. This way, you can keep track of which volunteers *received* their award -during the ceremony- and which ones couldn't attend or for any other reason, haven't received the award yet.
 - Utilizing specific *nominated dates/awarded dates* is a great method for easier tracking of those awards, years down the road. (e.g. If you set the nominated date, for all awards in a year, to the same nominated date -last day eligible for the awards- it will make it very easy to look up and report on any year of awards data.)
 - Similar to *Nominated date*, the *Awarded date* can be utilized for keeping track of which awards were received by the volunteer, and on which date. (e.g. Some of your volunteers don't want to attend the ceremony to receive their award but they want to collect it on a day they come in for their shift. -This date can be different, from the date the majority of all other awards were received, by volunteers.

Awards Reporting

Awards manager

- There are many methods for which you can report on your awards data. Though you can find very good data on your awards, from the *Awards manager*, this is not truly an “awards report”. Despite that, you can easily view/edit any existing awards in your system, from this tool, if you are simply looking to quickly look up some awards information (Think of it like using Advanced People search; Quick and dirty way of getting the info you need!).
 - Export to Excel* – This will export *all* the award results to an excel file, exactly how it is seen on screen. (*If any award results are check marked, it will export only those awards. If no awards are check marked, it will export *all* awards, seen on the screen at that time.*)

Awards (report)

- Awards details* – This report will produce results on an individual basis, for any existing awards that meet the criteria chosen, in that report. Results will be produced on screen.

Volunteer	Nominated, awarded	Status	Award type, comments
test, andrew	12/31/2021 01/01/2022	Awarded	Award Test

- Awards summaries* – This report will produce results on a summarized basis, for any existing awards that meet the criteria chosen, in that report. Results will be produced on screen and shown as a total of awards for the respective *award type*.

Award Test	48
Total	48